

3rd May, 1945.

BS.1945/4B.

NEW SOUTH WALES.

BUSINESS STATISTICS - APRIL, 1945.

C O N T E N T S.

PART I PRIMARY AND EXPORT INDUSTRIES.

SEASON. Continued drought in Riverina and West. Coastal rain.

WOOL. Shearing resumed. Sheep losses. Reduced wool clip.
World wool production and situation in U.S.A.

WHEAT. Progress of sowing. Rationing of wheat.

DAIRYING. Butter and Cheese production declining. Improved milk
supplies for Sydney and Newcastle.

GENERAL. Increase in main crop Potato contracts.
Small Maize harvest.

Meat - Reduced adult meat ration due to decline in
production.

PART II FINANCE AND TRADE.

GENERAL. UNCIO opened in San Francisco. Reverse Lend-Lease to
U.S.A. Income Tax Assessment Bill 1945 (only minor
changes in taxation). Bond purchases as condition to land
transactions held invalid. Third Victory Loan
oversubscribed.

N.S.W. STATE ACCOUNTS. July-March, 1944-45.

NOTE ISSUE. Notes held by Public, March, 1945. Denominations
of notes held.

RETAIL TRADE. Sales and Stocks, Large Sydney Stores - February, 1945.

RETAIL PRICES. March Quarter, 1945.

BASIC WAGE. Rates for May-July, 1945.

PART III INDUSTRY, TRANSPORT, ETC.

GENERAL. Australian Aluminium Commission.
Coal production in N.S.W., March Qr., 1945.

EMPLOYMENT IN N.S.W. February, 1945.

BUILDING INDUSTRY. Private Building Permits and Government
Building March Qr., 1945.
- New Houses - Private Permits and Govt. Mar.Qr.1945.

TRANSPORT. - Railways. Passengers, Freight and Finance, July-Mar.
1944-45.
Post war unification and modernisation proposals.

Trams & Buses. Passengers and Finance, July-Mar., 1944-45.

Motor Industry. Proposed manufacture of motor vehicles
by Ford Motor Coy. of Australia.

Motor Registrations. March, 1945.

PART I - PRIMARY AND EXPORT INDUSTRIES.

SEASON. Drought remains unrelieved in the Western Division and the Riverina, and all inland areas have been practically rainless over the last three to four weeks. Along the coastal belt adequate to heavy rain has fallen in each week in April.

WOOL. A general resumption of shearing is reported but progress is handicapped by a shortage of labour, and arrivals of autumn shorn wool are not as large as usual. Commonwealth authorities estimate drought losses of sheep at 20 million in Australia. At a recent date wool received in 1944-45 was 14 per cent. less in Australia and 15 per cent. less in N.S.W. than in the corresponding period of 1943-44. It is estimated that from five to six million sheep have been lost by drought in N.S.W., and losses are continuing.

Some data bearing upon world production of wool and the situation as regards wool supplies and consumption in the United States has been published by the International Wool Secretariat. War demands for meat and an assured market for Dominion and U.S.A. wools have resulted in a significant increase in wool production but due to adverse seasons in Australia and South America production will decrease in 1944-45.

WOOL PRODUCTION IN PRINCIPAL PRODUCING COUNTRIES.

Particulars	Australia	Argentina	U.S.A.	New Zealand	South Africa	Uruguay	Other Countries	World Total
	Million lbs. (Greasy).							
Production Av. 1934-5 to 1938-39	995	378	432	299	250	111	1,134	3,599
1943-44	1132	517	419	320	230	130	1,252	4,000 ^ø

^ø Unofficial Estimate.

(International Wool Secretariat)

The following statement shows that prior to the war consumption of wool in the United States varied greatly as between years, but showed little tendency to increase.

U.S.A. CONSUMPTION AND IMPORTS OF RAW WOOL.

Particulars	1928	1932	1935	1937	1938
	Million lbs. (Greasy).				
Consumption	650	498	855	677	567
Imports	240	56	200	322	103

Wartime consumption of domestic and imported wool in the United States has exceeded 1,000,000 lbs p.a. The U.S. Stock pile of foreign wool had been decreased by auctioning in U.S.A. from a peak of 342 m.lbs. to about 80 m. lbs. at Jan.30, 1945.

At the end of 1944 the Commodity Credit Corporation held 343 m.lbs. of domestic wool. The Government will purchase the 1945 clip at prices about the same as those paid in 1944. Army requirements indicate the use in Jan.-June, 1945 of from 300 to 400 m. lbs. of domestic wool, and it is possible demands in July-Dec., may be on a similar scale.

Prewar per capita consumption in the United States averaged about 4.5 lbs. (greasy) compared with over 9 lbs. (greasy) in the United Kingdom. The United States Tariff Commission considers it possible that post-war consumption of wool may rise about 25 per cent. above the pre-war level. U.S. wool production costs

are high, necessitating protection by tariff (at the rate of 34 cents. clean content). Latterly sheep numbers have tended to decline, but whether this trend will continue must depend in large degree upon post-war policy as regards protection of the domestic wool industry. It may be expected that if U.S.A. consumption increases to the extent thought possible, American post-war imports of wool will show a substantial increase.

WHEAT. An increase of from 20 to 40 per cent. in the area sown to wheat in N.S.W. is thought likely by the Dept. of Agriculture. Increases of from 30 to 40 per cent. in the north and north-west and from 20 to 25 per cent. in central districts are expected, but sowings in the south are uncertain, and an increase in area there is dependent upon substantial rains in the next few weeks. A considerable area has been sown in the Riverina in dry or only slightly moist seedbeds. Shortage of seed is limiting the area put under oats.

Rationing of wheat and wheat offals (as well as of fodder generally) is being applied to eke out supplies. Wheat for priority (pigs, poultry and dairying) industries allotted for April was 275,000 bus. a week; 220,000 bus. a week will be available in May, and for June and subsequent months it is hoped to provide about 200,000 bus. a week. Supplies to poultry keepers are being cut to 50 per cent. of last year's usage.

DAIRYING INDUSTRY. Production of butter is declining and stocks in cold stores are being drawn upon in N.S.W. Cheese from other States is being used (as for some time past) to augment local supplies.

Good rains resulted in an increased flow of milk in the Sydney and Newcastle zones and from April 27, 1945 householders were permitted six-sevenths in place of four-fifths of usual supply.

GENERAL. Potatoes. In N.S.W. the area of main crop potatoes contracted to be grown this season is 25,335 acres, compared with 22,036 acres in 1943-44 and 16,098 in 1942-43.

Maize. The N.S.W. 1944-45 maize harvest is estimated at about 2½ m. bus. - lowest for many years. The average for the seasons 1937-41 was 3.3 m. bus.

Meat. As from May 7, 1945 the adult ration of meat is to be reduced by one-eighth, and commercial users (makers of sausages, etc.) and hotels, cafes, etc. have had supplies of meat cut by one-quarter. The reduction results from declining meat production (due to drought) and the imperative need to maintain supplies for Britain and the armed forces. Australian production may not reach 900,000 tons this year unless an early change in seasonal outlook occurs. In 1944 about 1,035,000 tons of meat were produced. The revised ration is expected to reduce Australian consumption by from 50,000 to 60,000 tons a year.

PART II FINANCE AND TRADE.

GENERAL. The United Nations Conference on International Organisation opened in San Francisco on April 25, 1945. The Australian delegation is led by the Deputy Prime Minister (Mr. F.M. Forde) and the Minister for External Affairs (Dr. H.V. Evatt).

Australian Reverse Lend-Lease to the United States to Feb. 28, 1945 amounted to £A237.8 m.

The Income Tax Assessment Bill, 1945 makes only minor changes, principal of which are the raising of exemption from tax for persons with dependents from £102 to £156, inclusion of optical as medical expenses, and deductions from taxable income of £40 or £20 (according to degree of remoteness) for persons in remote areas.

Real Estate. The High Court has ruled that the requirement of bond purchases as a condition to approval of real estate transfers is in excess of the Commonwealth Treasurer's powers.

The Third Victory Loan of £100 m., subscriptions to which were received up to April 28, 1945 has been oversubscribed.

N.S.W. GOVERNMENT
ACCOUNTS.

For March, 1945 the combined accounts showed decreases in revenue of £366,000 and in expenditure of £828,000 compared with March 1944.

Special arrangements for the redemption of £3.84 m. of Treasury bills (vide BS.1945/2A, p.4) affect comparisons of the accounts for 1943-44 and 1944-45. In this connection this year's receipts include £3.25 m. from business undertakings, and expenditure the payment of £3.84 m. to the Commonwealth. Another special item was the receipt of £639,000 in respect of the transfer of Garden Island to the Commonwealth.

In the nine months of this financial year payments from Consolidated Revenue Fund exceeded receipts by £7.37 m. compared with an excess of payments of £8.28 m. in July-Mar., 1943-44. Business undertakings, etc. operated less favourably, the excess of revenue over expenditure (not including interest, exchange and sinking fund) for the nine months having decreased from £7.20 m. in 1943-44 to £6.84 m. this year. In the aggregate the results were £542,000 more favourable than in the nine months ended of 1943-44.

Of the business undertakings Sydney Harbour alone showed an improved result (+£92,000) compared with last financial year. There was a greater fall in revenue than in expenditure on the railways and a greater increase in expenditure than in revenue of tramways and omnibuses. Road Transport and Traffic and Main Roads accounts were £188,000 and £18,000 less favourable than as at March, 1944.

NEW SOUTH WALES GOVERNMENT ACCOUNTS.

Nine months ended March.

Accounts.	1944.	1945.	Increase (+) or Decrease (-)
	£000	£000	£000
Revenue - Consolidated Fund	20,163	24,679	(+) 4,516
ø Business Undertakings	32,462	29,976	(-) 2,486
Main Roads	1,925	2,009	(+) 84
Total	54,550	56,664	(+) 2,114
Expenditure - Consolidated Fund	28,442	32,053	(+) 3,611
ø Business Undertakings	25,262	23,121	(-) 2,141
Main Roads	1,923	2,025	(+) 102
Total	55,627	57,199	(+) 1,572
Excess of Expenditure	1,077	535	(-) 542

ø Railways, Tramways and Buses, Road Transport and Traffic Fund, and Sydney Harbour.

NOTE ISSUE. In the first quarter of this year notes in the hands of the public decreased by £15.9 m. compared with an increase of £11.2 m. in the corresponding period of 1944. With the return of notes after Easter the amount held fell to £169 m. at April 16. From October, 1944, to March, 1945 there was a decrease of £11.4 m., whereas in the corresponding period of 1943-44 notes in the hands of the public increased by £21.8 m.

There has been some dishoarding and it is probable that there has been a substantial return of notes held by Allied servicemen no longer requiring Australian currency.

AUSTRALIAN NOTES HELD BY PUBLIC

(£ millions)

Sept.	1939	37.3	1943	Dec.	150.0	1944	Dec.	187.2
	1941	57.8	1944	Jan.	148.8	1945	Jan.	178.2
	1943	134.7		Feb.	152.3		Feb.	176.5
	1944	181.9		Mar.	161.2		Mar.	171.3

An announcement that the Government was considering the recall of notes of large denominations as a measure toward combating black marketing caused a very considerable inflow of notes of denominations of £10 or more. Between December 1944 and the end of March 1945 £5 notes decreased by £3.4 m. £10 notes by £11.2 m., £50 notes by £1.2 m. and £100 notes by £1.5 m. Notes of £10 or more decreased from £54.8 m. to £43.3 m. or by 21 per cent. whilst those of £1 denomination increased by £4.1 m. Details are shown below (Comparable data over the war period appeared in BS 1945/2B at p.4.)

AUSTRALIAN NOTES ISSUED AND NOT REDEEMED BY DENOMINATIONS.

Denomination	December, 1944		January 1945		February, 1945		March, 1945	
	Value	Pro- portion	Value	Pro- portion	Value	Pro- portion	Value	Pro- portion
	£m.	%	£m.	%	£m.	%	£m.	%
10s.	8.4	4.1	8.0	4.1	8.0	4.1	8.3	4.3
£1	64.6	31.9	61.1	31.6	62.2	32.2	68.7	35.8
£5	74.7	36.9	70.8	36.7	70.8	36.7	71.5	37.3
£10	44.4	21.9	42.2	21.8	40.9	21.2	33.2	17.3
£20	.1	.1	.1	.1	.1	.1	.1	.1
£50	4.5	2.2	4.4	2.3	4.3	2.2	3.2	1.7
£100	5.7	2.8	5.9	3.0	5.7	2.9	4.2	2.2
£1000	.1	.1	.7	.4	1.2	.6	2.6	1.3
Total	202.5	100.0	193.2	100.0	193.2	100.0	191.8	100.0

RETAIL TRADE. In February, 1945 the value of sales in a group of large stores in Sydney was 6.7 per cent. greater than in Feb., 1944 (when there was one more trading day). In the three months ended Feb. the value of sales was 13.4 per cent. greater this year than a year ago, when the value was 4.6 per cent. less than in Dec.-Feb., 1942-43. There is some indication of an upward trend in retail turnover; compared with a year earlier successive three monthly moving averages ending in each of the last seven months show increases in total sales of 6.1%, 7.6%, 7.0%, 6.8%, 7.4%, 11.0% and 10%.

The value of stocks (at cost) held by these traders was 7.7 per cent. greater in Feb., 1945 than a year before, the three monthly moving average in Dec.-Feb. at +4.9 per cent. standing higher compared with the corresponding months of the preceding year than for any other recent three monthly period. Notable increases in stocks between recent three monthly period. Notable increases in stocks between Feb., 1944 and Feb., 1945 were 15.3% in women's wear (including 39% in girls' and children's wear), 24.4% in boys' wear, 24.4% in boy's wear, 24.8% in dress price goods, 24.7% in fancy goods, and 32.6% in books, stationery, etc. Despite the increase in sales of 20.8% stocks of hardware were 4.4% greater, but, as for many months past, stocks of boots and shoes (-4.5%) were lower than a year before.

RETAIL TRADE - EXPERIENCE OF LARGE SYDNEY STORES.

Percentage Increase (+) or Decrease (-) from corresponding period previous year.

Year	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Two months ended Feb.
Value of Sales.							
1941-42	(+) 20.5	(+) 15.1	(+) 7.4	(+) 4.8	(+) 5.5	(+) 3.4	(+) 4.4
1942-43	(-) 7.0	(-) 17.3	(-) 16.3	(-) 23.1	(-) 15.3	(-) 27.5	(-) 21.5
1943-44	(-) 11.5	(-) 9.9	(-) 1.7	(+) 5.4	(-) 10.0	(+) 1.6	(-) 4.6
1944-45	(+) 3.7	(+) 5.6	(+) 10.6	(+) 6.1	(+) 20.1	(+) 6.7	(+) 13.4
Value of Stock.							
1941-42	(+) 10.5	(+) 13.9	(+) 16.2	(+) 21.5	(+) 21.1	(+) 19.2	(+) 20.3
1942-43	(+) 5.9	(+) 2.1	(-) 1.2	(+) 1.5	(+) 6.0	(+) 2.2	(+) 4.2
1943-44	(-) 10.0	(-) 9.1	(-) 10.1	(-) 12.8	(-) 12.6	(-) 2.9	(-) 8.0
1944-45	(+) 5.0	(+) 4.3	(+) 4.4	(+) 4.6	(+) 2.6	(+) 7.7	(+) 5.1

Departments showing the largest increases in sales compared with Feb., 1944 were Women's Fashion Depts. (25%), Women's underwear (19%), Building Materials, Tools, etc. (15.2%), General Hardware (23.4%) and Electrical Goods (50.1%). The three later mentioned reflect the rather limited expansion of house-building, with the removal of restrictions upon sale of heating and cooking appliances the major factor in the increased sale of electrical goods.

RETAIL TRADE - SALES BY LARGE SYDNEY STORES.

Percentage movement from same month in preceding year.

Month	Wearing Apparel.				Household Piece Goods	Furniture and Hardware
	Dress Piece Goods	Women's Wear	Men's & Boys' Wear	Boots & Shoes		
1943-Feb.	(-) 22.4	(-) 38.5	(-) 38.5	(-) 18.6	(-) 36.3	(-) 26.0
1944-Jan.	(+) 18.2	...	(+) 6.5	(-) 5.9	(-) 30.7	(-) 28.2
Feb.	(+) 31.2	(+) 8.5	(+) 7.4	(-) 4.7	(-) 24.5	(-) 9.7
Oct.	(+) 29.3	(+) 7.7	(+) 6.2	(-) 5.2	(+) 3.4	(+) 3.3
Nov.	(+) 35.7	(+) 14.4	(+) 3.5	(-) 1.7	(+) 0.6	(+) 11.5
Dec.	(+) 15.8	(+) 6.4	(+) 10.4	(-) 4.0	(-) 3.2	(+) 9.1
1945-Jan.	(+) 21.3	(+) 24.4	(+) 8.3	(+) 8.8	(+) 17.6	(+) 27.2
Feb.	(+) 3.1	(+) 12.4	(+) 3.8	(-) 0.2	(+) 0.2	(+) 10.9

RETAIL PRICES.

Index numbers of Retail Prices ("C" Series) for March Quarter, 1945 for the Six Capital Cities, for Sydney, and for Five Towns in N.S.W. (including Sydney) were slightly lower than in the preceding quarter and the corresponding quarter of 1944. The slight fall in the index numbers in Sydney in the latest quarter was due mainly to the effect of recent price control orders affecting some items of men's clothing, countering a slight increase in the cost of food and groceries.

For the Six Capitals the index numbers (weighted average) were 1123 and 1124 in the first quarters of 1945 and 1944, respectively, and 1126 in Dec. Qr., 1944, compared with 1143 (the wartime peak) in June Qr., 1943. From Dec. Qr., 1944 to March Qr., 1945 decreases occurred in Sydney (0.4%), Melbourne (0.5%) and Hobart (0.5%); there was an increase of 0.2% in Brisbane and no change in Adelaide and Perth.

INDEX NUMBERS OF RETAIL PRICES "ALL ITEMS" ("C" SERIES).

(Cost of food, groceries, housing, clothing and miscellaneous items)

Area.	1939	1941	1943.			1944.		1945.
	Sept. Qr.	Mar. Qr.	Mar. Qr.	June Qr.+	Dec. Qr.	Mar. Qr.	Dec. Qr.	Mar. Qr.
N.S.W.								
Sydney	933	1018	1141	1165	1165	1143	1142	1138
Five Towns (wtd.av.)	930	1015	1137	1162	1162	1139	1138	1135
Australia.								
Six Capitals (wtd.av.)	916	995	1119	1143	1143	1124	1126	1123
Thirty Towns (" ")	914	992	1123	1140	1140	1120	1122	1120

* Base: Weighted average in six capital cities; 1923-27 = 1000.
+ Wartime peak.

The course of prices in Sydney during the war period is illustrated by the movement in index numbers for various component groups of the "All Items" index, during the periods up to and since the adoption of the new price stabilisation policy in June Qr., 1943. Small, but significant decreases in some groups during the later period indicate the efficacy of the measures pursued to check the former upward trend of prices.

PERCENTAGE MOVEMENT IN GROUP INDEX NUMBERS FOR SYDNEY.

Increase (+) Decrease (-)

Period.	Food and groceries	Rent.	Clothing.	Misc. Items.	Total.
Sept., 1939 to June, 1943	(+) 14.5%	(+) 0.3%	(+) 75.9%	(+) 23.7%	(+) 24.9%
June 1943 to Mar., 1945	(-) 3.6%	(-) 0.03%	(-) 4.0%	(+) 0.02%	(-) 2.3%

BASIC WAGE
RATES.

Rates ruling from the first pay period in May, 1945 (per week) are 98s. in Sydney and Melbourne and 93s. in each of the other capital cities. The rates show decreases of 1s. in Sydney and Hobart but are unchanged in Melbourne, Brisbane, Adelaide and Perth. These are predominant rates. The rates for N.S.W. Crown Employees remains at 97s. per week.

PART III. INDUSTRY, TRANSPORT, ETC.

General. The Australian Aluminium Commission was appointed on April, 27, 1945, to proceed with the establishment of the aluminium industry in Tasmania on behalf of the Commonwealth Government.

Coal. Production of coal in N.S.W. in the first quarter of the year was greater in 1945 than in 1944, though less than in 1943. Development of open cut mining has contributed materially to the recent improvement in output. Published particulars of production are as follow:-

PRODUCTION OF COAL - NEW SOUTH WALES.

'000 tons.

Jan-Mar.	Northern District.		Southern District		Western District		Total, New South Wales.		
	Under-ground	Open Cut	Under-ground	Open Cut	Under-ground	Open Cut	Under-ground	Open Cut	Grand Total.
1943	1,956	-	531	-	379	14	2,866	14	2,880
1944	1,844	-	374	-	360	26	2,578	26	2,604
1945	1,710	64	541	-	392	61	2,644	124	2,768

EMPLOYMENT IN N.S.W. The number of persons in employment in N.S.W. in February, 1945 (781,000) was 1,800 greater than in the preceding month and 6,200 greater than in February, 1944. During the month there were gains of 900 males (400 in Government employment) and 900 females (Govt. -300, private + 1,200). The gain over the year was entirely in males, females showing a decrease of 600 over the twelve months. In that period the number with private employers increased by 9,500 (including 6,500 males) and in Government employ decreased by 3,300, a gain of 300 men being offset by the loss of 3,600 women.

In February, 1945, the number on private payrolls was 15,100 greater than in July, 1943, when private employment was at its lowest wartime level. Releases from the Services in implementation of Cabinet decisions on allocation of manpower and natural increase are elements in the gain in private employment.

. NEW SOUTH WALES.

Estimated Salary and Wage Earners Employed (Excluding Rural Workers and Household Domestics.
(Includes Civil Construction Corps in N.S.W.)

Year and Month	MALES			FEMALES			TOTAL		
	Govt. (C'th.State Local and Allied).	Private Employers	Total	Govt. (C'th.State Local and Allied).	Private Employers	Total	Govt. C'th.State Local and Allied)	Private Employers	Total
	'000	'000	'000	'000	'000	'000	'000	'000	'000
1939-July	136.5	393.4	529.9	19.4	148.6	168.0	155.9	542.0	697.9
1941-Nov.	144.3	411.1	555.4	23.0	201.5	224.5	167.3	612.6	779.9
	146.4	410.1	556.5	23.4	203.9	227.3	169.8	614.0	783.8
1943-Feb.	156.7	372.7	529.4	37.2	207.3	244.5	193.9	580.0	773.9
	156.6	365.4	522.0	45.8	204.1	249.9	202.4	569.5	771.9
1944-Jan.	152.5	369.6	522.1	46.6	205.5	252.1	199.1	575.1	774.2
	153.0	369.6	522.6	47.2	205.3	252.7	200.2	575.1	775.3
1945-Jan.	152.9	375.6	528.5	43.9	207.3	251.2	196.8	582.9	779.7
	153.3	376.1	529.4	43.6	208.5	252.1	196.9	584.6	781.5

From January to February, 1945, there was an increase of 400 persons employed in factories notwithstanding the closing down of some munitions plants. There was a check to the downward trend of females in factories with a gain (probably seasonal) of 700 which offset the reduction of 300 males. Other significant changes were gains of 400 in building and construction, 700 in transport and communication and 800 (all females) in professional and personal services.

Factory employment reached a peak (314,400) in October, 1943; since then it has fallen by 9,500 (males by 2,500 and females by 7,000). A gain of 3,200 men in building and construction from the low point of 25,700 in August, 1944 is worthy of note, although the number remains 25,400 less than in July, 1941.

NEW SOUTH WALES.

ESTIMATED TOTAL EMPLOYMENT IN MAIN INDUSTRIAL GROUPS. Thousands.

Year and Month	Factory		Mining & Quarrying		Building & Construction (a)		Transport & Communication		Retail Trade		Other Commerce & Finance		Professional & Personal Services (b)	
	M.	F.	M.	F.	M.	F.	M.	F.	M.	F.	M.	F.	M.	F.
1939-July	158.8	59.3					Not available.							
1941-Nov.	210.5	80.7	25.8	.2	50.5	.7	79.8	8.4	41.5	42.9	44.6	19.4	52.6	58.0
Dec.	213.2	81.8	25.8	.2	49.0	.7	81.8	8.4	41.2	44.3	42.6	19.2	52.3	58.2
1943-Feb.	217.2	91.4	24.7	.2	34.4	.7	81.0	10.8	29.7	39.8	36.1	21.4	44.3	61.1
July	217.8	94.6	25.1	.2	29.9	.7	81.5	12.9	28.7	38.5	33.2	20.5	43.3	62.3
1944-Jan.	219.9	94.4	24.6	.2	28.1	.7	81.5	13.5	28.4	37.5	34.1	20.6	44.0	64.4
Feb.	219.7	94.1	24.7	.2	28.0	.7	82.2	13.8	28.2	37.3	34.2	20.6	44.7	64.8
1945-Jan.	215.7	88.8	24.8	.2	27.8	.7	85.6	14.0	29.5	38.5	35.7	20.7	46.8	67.3
Feb.	215.4	89.5	24.6	.2	28.2	.7	86.2	14.1	29.4	38.4	35.8	20.6	46.8	68.1

(a) Including A.W.C. projects. (b) Including Education, Health, Hotels, Restaurants, and Professional and Personal Services (except private domestics).

BUILDING INDUSTRY. Private building permits granted by local authorities in Sydney and suburbs in March, 1945, were for a value of £178,000 compared with £159,000 in March, 1944 and £191,000 in February, 1945. Building work to be undertaken in N.S.W. on account of Governments amounted to £387,000, £256,000 and £199,000 in the respective months.

The value of permits granted and of Government buildings authorised or contracted for in New South Wales (as far as recorded) in March Quarter, 1945 was £1,792,000 which amount was the greatest for any quarter since 1942 (inclusive) excepting only March Qr., 1943 (£2.4 m.) and 46 per cent greater than in Mar. Qr., 1944.

Private building has increased in both the metropolitan and country areas. In the metropolis the value in March Qr. was greater than in any other since Dec. Qr., 1941 and 44 per cent. greater than in the corresponding quarter of 1944. Permits granted in March Qr. 1945 in 129 country towns (including Newcastle) exceeded in value those of any quarter since the first of 1943 and were 140 per cent. greater than in March Qr., 1944.

Government building projects authorised or contracted for averaged £1.14 m., £1.08 m. and £0.71 m. per quarter in successive years 1942 to 1944 and amounted to £911,000 in March Qr., 1944.

It is apparent that the general tendency is for Government building to decrease and for private building to increase; the relatively high figure for Government building in March Qr., 1945 may be attributed to undertakings for the Royal Navy, and, therefore, as an incidental interruption to the former trend.

VALUE OF PUBLIC AND PRIVATE BUILDING IN N.S.W.

(& thousands)

Period.	Sydney and Suburbs			Balance of State ϕ			Total New South Wales. ϕ		
	Private	Govt.	Total	Private	Govt.	Total	Private	Govt.	Total
Year 1940	11,718	894	12,612	4,487	2,672	7,159	16,205	3,566	19,771
1943	1,361	3,109	4,470	508	1,211	1,719	1,869	4,320	6,189
1944	1,603	1,757	3,360	869	1,093	1,962	2,472	2,850	5,322
1943-Dec.Qr.	264	724	988	138	122	260	402	846	1,248
1944-Mar.Qr.	357	504	861	149	215	364	506	719	1,225
Sept.Qr.	436	542	978	257	386	643	693	928	1,621
Dec. Qr.	495	432	927	258	283	541	753	715	1,468
1945-Mar. Qr.	514	607	1,121	367	304	671	881	911	1,792

ϕ For private permits exclusive of unincorporated areas and all Shires except seven semi-urban Shires near Sydney.

New Houses. Private permits granted in Sydney and Suburbs in March, 1945 included 106 new houses - the greatest number of any month since January, 1942 - compared with 7, 2 and 18 in March 1942, 1943 and 1944, respectively, and 88 in February, 1945. Quarterly comparisons are given in the appended table. In 129 towns and seven semi-urban shires 305 permits were granted for new houses in March Qr., 1945 - the greatest number since June Qr., 1943 - compared with 93 in March Qr., 1944 and 233 in Dec. Qr., 1945.

In the State there were 109 new houses (75 in the metropolis) authorised or contracted for on Government account, compared with 1 (1) and 44 (-) in March 1944 and 1943 respectively and 52 (5) in February, 1945. Since the present programme of Government housing projects was initiated, the number of new houses undertaken in successive quarters from that ended June, 1944, was 79, 249, 266 and 192, but the numbers fall greatly below the State's allocation.

The grand total of 758 new houses (private and government) for March Qr., 1945, was the highest of any quarter for three years, but was far from comparable with the average of 2,386 per quarter (private permits only) in the years 1927 to 1941.

NEW HOUSES UNDERTAKEN ON PRIVATE AND GOVT. ACCOUNT. IN N.S.W.

Period.	Sydney and Suburbs.			Balance of State ϕ			Total, New South Wales ϕ		
	Private.	Govt.	Total	Private	Govt.	Total.	Private	Govt.	Total
Year 1940	5,706	4	5,710	4,323	34	4,357	10,029	38	10,067
1943	83	2	85	374	339	713	457	341	798
1944	351	440	791	677	159	836	1,028	599	1,627
1943-Dec.Qr.	19	1	20	93	2	95	112	3	115
1944-Mar.Qr.	40	1	41	93	4	97	133	5	138
Sept.Qr.	107	151	258	191	98	289	298	249	547
Dec. Qr.	145	211	356	233	55	288	378	266	644
1945-Mar.Qr.	261	110	371	305	82	387	566	192	758

ϕ See note to preceding table.

Beside authorising the Rural Bank to make advances for 1,000 new homes (vide B.S. 1945/4A, p. 8) the N.S.W. Government has approved of the construction of 300 new houses in the Metropolitan (150) Newcastle (75) and Port Kembla-Bulli (75) areas through co-operative building societies. It has also allocated 50 each to Ryde Municipal and Newcastle City Councils under the same conditions as those to be erected through co-operative building societies.

A ballot for occupation of one hundred houses erected by the State Housing Commission in the metropolis was conducted on May 3, 1945. Tenders closed on May 2, 1945, for erection of 80 houses at Abbotsford, for the Commission. The Commonwealth Government has under consideration the question of review of priorities with regard to building materials, etc., in relation to private housing projects.

Surplus Army huts are to be made available to State Housing Authorities with a view to their conversion in situ or for removal for the provision of emergency housing. Plans of this character are already in course of development in the Newcastle district.

TRANSPORT.

STATE RAILWAYS. A report on the standardisation of Australian railway gauges, and the modernisation of rolling stock, etc., has been submitted by the Director-General of Land Transport. An ultimate expenditure of £200 m. is foreseen of which £76 m. would be involved to provide arterial lines and to convert the main lines in South Eastern States to the 4 ft. 8½ in. gauge (used in this State) as a first step.

The N.S.W. railways carried more passengers during March, 1945, than in March of any earlier year, but on account of drought, decreased traffic in war goods, and coal restrictions, the quantity of goods and livestock carried was 8.9 per cent. less than in March, 1944.

During the nine months ended March, passenger journeys were at a record level but there was a small decrease in goods and livestock carried compared with July-Mar., 1942-43 or 1943-44. Gross earnings were £2.42 m. less while working expenses (not including interest, etc.) decreased only £1.93 m. Net earnings were less favourable for the nine months than in any year since 1939-40, but were considerably greater than in pre-war years.

N.S.W. GOVERNMENT RAILWAYS.

Year	Month of March			Nine months ended March.			
	Passenger Journeys	Goods and Livestock	Gross Earnings	Passenger Journeys	Goods and Livestock	Gross Earnings	Net Earnings ø
	millions	000 tons	£000	millions	000 tons	£000	£000
1939	14.7	1,336	1,632	141.2	11,314	14,225	3,745
1942	19.0	1,619	2,393	161.6	13,842	19,925	6,025
1943	30.7	1,622	2,829	175.9	14,803	25,559	6,553
1944	20.8	1,656	2,902	186.6	14,682	26,194	6,010
1945	21.6	1,509	2,605	188.2	14,213	23,773	5,519

ø Gross earnings less working expenses, available to pay interest, etc. on Railway loan debt.

GOVERNMENT TRAMS AND 'BUSES. The Commissioner for Road Transport stated recently that post-war plans provide for replacement of trams by 'buses in Newcastle. Extended use of motor 'buses in Sydney and suburbs is also contemplated.

During March, 1945 (when there was an industrial stoppage for one day) the number of passenger journeys was a little greater than in March, 1944, but gross earnings declined a little, while working expenses increased and results on working were less favourable for the month than in March of any recent year.

These services transported 23.6 million more passengers in July-Mar., 1944-45 than in the corresponding period of 1943-44, and gross earnings (+£74,000) and working expenses (excluding depreciation, interest, etc.) (+£68,000) each increased. Compared with July-Mar., 1939-40 receipts had increased almost £1m. or by 29.1 per cent., but working expenses increased even more (by £1.1m. or by 38.8 per cent). Latterly the tendency has been for working expenses to increase more rapidly than gross earnings.

N.S.W. GOVERNMENT TRAMS AND 'BUSES - SYDNEY AND NEWCASTLE.

Year	Month of March.				Nine months ended March.			
	Passenger Journeys	Gross Earnings	Working Expenses x	Net Earnings ø	Passenger Journeys.	Gross Earnings	Working Expenses x	Net Earnings ø
	millions	£000	£000	£000	millions	£000	£000	£000
1939-40	34.8	405	335	70	285.5	3,377	2,820	557
1941-42	40.4	457	389	68	360.9	4,074	3,403	671
1942-43	44.3	497	412	85	377.0	4,195	3,591	604
1943-44	45.1	502	439	63	386.5	4,286	3,847	439
1944-45	45.9	490	452	38	410.1	4,360	3,915	445

x Excluding Depreciation. ø Gross earnings less working expenses available to pay interest, depreciation, etc., on loan debt.

MOTOR INDUSTRY. The Ford-Motor Company of Australia (and the Ford Manufacturing Company of Australia) is the third organisation to have submitted proposals to manufacture motor vehicles in Australia. The proposals are under consideration.

In March, 1945, motor vehicles registered in New South Wales for the first time averaged 52 (7 cars and 45 lorries and vans) per week, compared with 54 (6 and 48) and 94 (4 and 88) in Feb., 1945 and March, 1944, respectively. With the exception of January, 1945, the number was the lowest of any month since July, 1943.

At 31st March, 1945, there were 296,021 registered vehicles; an increase of 935 during March, and of 13,966 compared with the number at the end of March, 1944. At the latest date there were 15,037 more cars and 10,752 more lorries and vans included in the increase of 28,669 vehicles of all kinds from the wartime low point reached in July, 1942. The increase has derived in large part from the return to use of laid-up vehicles, though, in relation to lorries and vans (which in March, 1945, exceeded the highest pre-war number by 4,001) new vehicles represent a substantial proportion. Latterly, registrations have tended to increase less rapidly than during 1943-44.

MOTOR VEHICLES REGISTERED IN N.S.W.

Vehicles.	At end of month.			Increase.			
	Aug. 1939. ★	July, 1942. ø	Mar., 1945.	Dec. 1944.	Jan. 1945.	Feb. 1945.	Mar., 1945.
	000	000	000				
Cars	216.6	170.0	185.1	864	276	208	213
Lorries and Vans	77.6	70.9	81.6	578	329	345	471
All Vehicles	329.2	267.4	296.0	2,012	809	723	935

★ Pre-war peak. ø Lowest war-time number of cars.